



BUSML 4204 (Section 4675): MARKETING PROJECTS
Spring 2017

Project-Based Marketing Consulting

Professor:	Dr. Deborah Mitchell	Classroom:	Mason 405
Office:	512 Fisher Hall	Class Time Slot:	M 5:30 – 8:30 pm
Email:	mitchell.1120@osu.edu	Hours allocated to	
Phone:	614-531-9995	Course per Week:	9 hours MINIMUM

I. Course Overview

Project-Based Marketing Consulting (BUSML 4204: Marketing Projects) is an **action-based learning experience** as well as a **competition**.

You will work in a **team of approximately six (in some cases a more than six) students** on a real-world, “live” project. Your task is to develop and provide the following deliverables:

1. A **comprehensive marketing implementation plan** for a client organization.
2. A fully developed **set of sample tactical elements** that will be utilized within the plan (e.g., a set of print and/or broadcast advertisements; sample pages from a website; sample sales promotions, sample YouTube videos, etc.).
3. **Research insights, findings and other analyses** to support your recommendations.
4. A final **presentation** to your client, communicating in a compelling fashion your recommendations, plan and supporting research.

This course represents a capstone experience in your education as a marketing major at the Fisher College of Business. It is an opportunity to integrate and apply everything you’ve learned to date in diagnosis, analysis, research, and making strategic and tactical recommendations for your client. Teams will also compete with one another, and winning teams will be announced, based on team performance in this marketing consulting project.

• **A Marketing Consulting Team**

In this course your team will take the perspective of a project team working within a marketing consulting firm. True marketing consulting firms are well-versed and competent in all aspects of marketing strategy and tactics as opposed to one narrow area such as PR or social media. This means they are skilled in aiding clients across various marketing domains including segmentation, targeting, positioning, the traditional “4Ps, branding, managing customer loyalty, and mining customer insights for innovation.

Effective marketing consultants are able to accomplish key tasks:

- Quickly grasp the current business situation.
- Identify and leverage appropriate marketing knowledge and techniques.
- Provide a level of objectivity not achievable within the company.
- Create an appropriate research plan and analyze all relevant data.
- Make strategic and tactical recommendations.
- Create an appropriate implementation plan.
- Communicate findings and recommended actions effectively and persuasively.

As a marketing major in the Fisher College of Business, you have taken several marketing courses tied to various elements of the marketing process. In this Project-Based Marketing Consulting course you will integrate and tap this knowledge base and develop new skills in your role as a member of a marketing consulting team.

• **Your Approach as a Member of a Marketing Consulting Team**

Like most disciplines, there are few hard and fast "rules" and "established procedures" in marketing. This will become especially obvious in this course. With rapid developments in technology, "big data" and the diffusion of new platforms such as social and mobile media, the field is undergoing crucial and game-changing transformations. In addition, in many markets, strategic agility has become paramount in the face of such disruptive change. Marketers must be able to lead this charge, using creativity and informed intuition based on solid training and expertise. In this course you will move beyond looking for "the right answer" to instead embrace a strategic approach to marketing problem-solving. The real-world "live" project is an opportunity to accomplish exactly this.

II. Course Objectives

From this course you will:

- Develop critical analysis and problem-solving abilities with respect to managing the marketing process.
- Gain first-hand experience in developing a comprehensive, integrated marketing implementation plan.
- Develop collaborative skills and expertise, working as part of a high-functioning team in a high-stakes competitive environment.

III. Course Materials

There is no textbook or course packet required for this course.

Class materials will be posted on Carmen (as and when necessary).

IV. Class Format

You should keep the official class time slot always blocked and set aside in your calendar for the duration of the semester. We will meet together as a class only for designated class sessions (please see the course timeline on page 7 and the course flowchart on page 6 of this syllabus document for the **tentative schedule** for class sessions). In addition, teams will meet outside of class, and will meet by phone and in person with the course instructor at regular intervals by prior appointment. EVERY WEEK YOU WILL BE WORKING WITH ME AND/OR YOUR TEAM DURING THE CLASS PERIOD, hence you should always keep the time blocked in your schedule.

V. Grade Structure

The following grade structure will be utilized for this course:

<u>Graded Component</u>	<u>% of the Final Grade</u>
1. Implementation Plan, Report & Supporting Materials	60%
2. Final Presentation	20%
3. Peer Evaluation	10%
4. On-course Project Progress	10%
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Total:	100%

VI. Grading Scale

The grading scale and point conversion that will be utilized for the final grade are as follows:

GPE			GPE		
A =	93 – 100%	4.0	C+ =	77 – 79.99%	2.3
A- =	90 – 92.99%	3.7	C =	73 – 76.99%	2.0
B+ =	87 – 89.99%	3.3	C - =	70 – 72.99%	1.7
B =	83 – 86.99%	3.0	D+ =	67 – 69.99%	1.3
B- =	80 – 82.99%	2.7	D =	63 – 66.99%	1.0

A: Exemplary Performance; A-: Strong Performance; B+: Good Performance; B: Adequate Performance; B-: Adequate Performance, with Some Deficiencies; C+: Weak Performance, with Serious Deficiencies; C: Poor Performance, with Pervasive Deficiencies

(Note: Performance below the “C” level will be addressed on a case-by-case basis.)

VII. Explanation of Graded Components

- **Implementation Plan, Report & Supporting Materials: 60% of the Final Grade**

The implementation plan that you develop based on your research, analysis and recommendations should follow the outline shown on page 8 of this syllabus. In the appendices of this report, please detail your research design, analysis and findings as well as a section containing samples of tactical elements (e.g., a set of print and/or broadcast advertisements; sample pages from a website; sample sales promotions, sample YouTube videos, etc.).

- **Final Presentation: 20% of the Final Grade**

Teams will make their final presentation to the client and the instructor. In this presentation, each should communicate the main selling points of your plan to your client (and/or other relevant stakeholders) and the strength of your recommendations. Your team's presentation will be evaluated on dimensions including clarity, persuasiveness and professionalism.

- **Peer Evaluation: 10% of the Final Grade**

Each team member will provide a performance evaluation of the other members, using the framework shown on page 11 of this syllabus document.

- **On-course Project Progress: 10% of the Final Grade**

An effective marketing consulting team works in a disciplined way to structure the project, conduct primary and secondary research, analyze the research, formulate strategy and make strategic and tactical recommendations. This process required consistent work at a high level of competence and efficiency. Pulling it all together at the very last minute doesn't translate to a strong project. Based on your regular meetings with the instructor and updates of your progress, the instructor will evaluate each team on how consistent and on-course your team's performance was, on the project.

VII. Team Formation

You will have an opportunity to form your own team, of **6-7 students**, in the first class session. It is expected that students in a team have different class and work schedules. However it is extremely crucial for each team to manage meeting times, and effectively delegate work among team members to ensure smooth progress on the project. Please designate one student for your team, by the end of the first class session, to be the main point of contact with the instructor and the client. Your Team Composition List, with names and contact info included, is due via Dropbox by the evening of our first class meeting (see Carmen for more details).

IX. Attendance Policy, Professionalism and Etiquette

To maintain the highest professional standards expected of a senior-level class that offers a capstone experience, the following attendance and classroom policies have been designed for this course -

1. **Attendance is mandatory for the sessions that we meet as a class.** Unexcused absences will lower your grade.

Excused absences from these sessions involve writing me (beforehand, except in cases of emergency) and obtaining my written permission to miss class. In terms of policy and practice, I make every effort to collaborate with students and accommodate reasonable needs as best as I can. Your collaboration is necessary and expected, as well.

If you have to miss class on a particular day, please make sure to get notes from a classmate. In addition, you can email me to set up a call or otherwise discuss any questions you may have regarding the material you missed.

2. For each of the class sessions (please see the course timeline on page 7 and the course flowchart on page 6 of this syllabus document for dates), **please arrive on time**. If you are going to be over five minutes late, or need to leave early for a specific reason, please get prior permission and present necessary documentation.
3. **Food and drink consumption**. Please minimize the consumption of food or drinks (except water) during class.
4. **Please be professional and courteous in your communication with the client**, with other team members and classmates, and with the instructor (see page 11 of this syllabus document for guidelines).

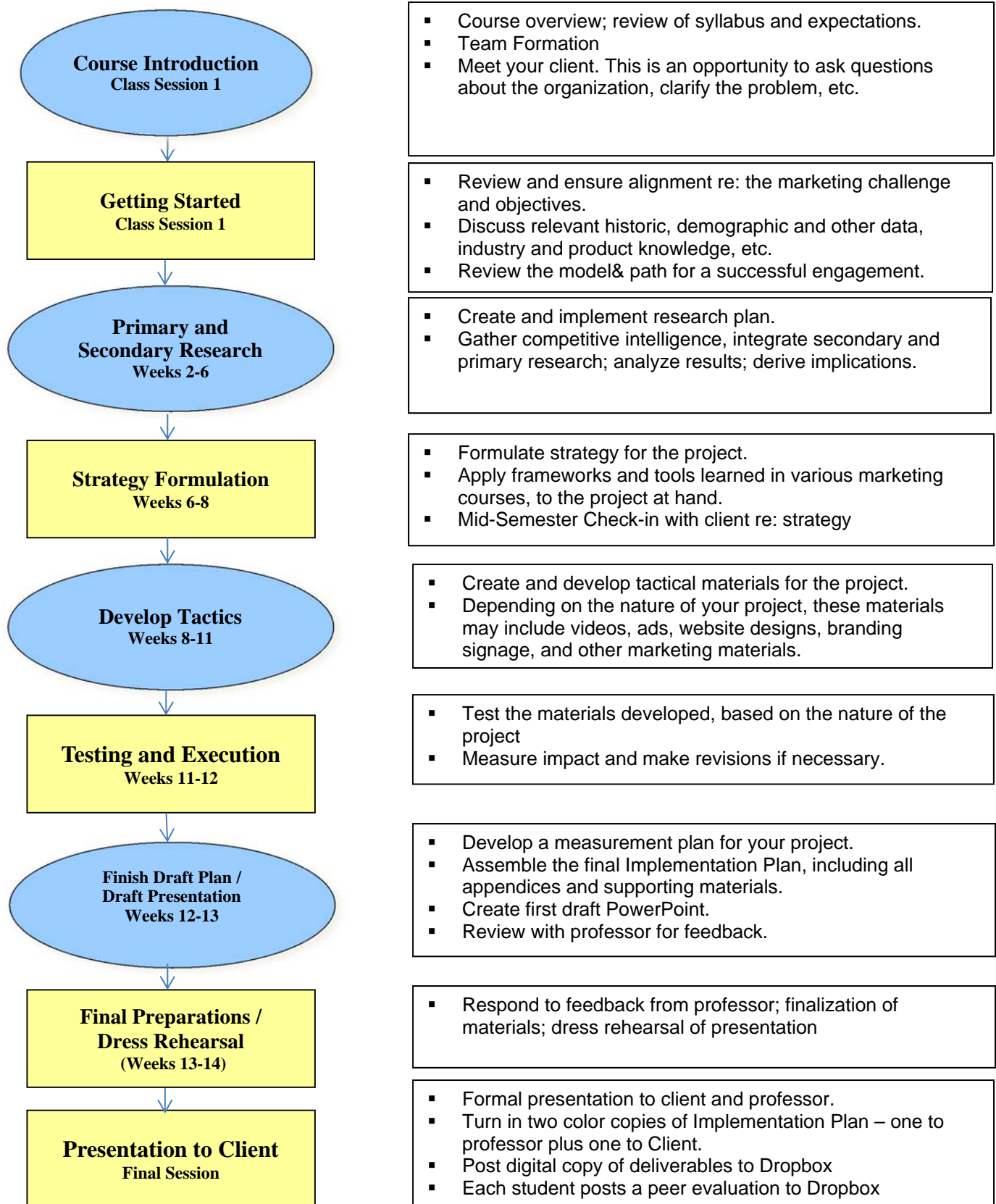
X. Academic Integrity

Academic integrity is essential to maintaining an environment that fosters excellence in learning, teaching, research, and other educational and scholarly activities at Fisher College of Business and The Ohio State University. Thus, The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the University's *Code of Student Conduct*, and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the University's *Code of Student Conduct* and this syllabus may constitute "Academic Misconduct."

Other sources of information on academic misconduct (integrity) to which you can refer include:

- The Committee on Academic Misconduct <http://oaa.osu.edu/coam.html>
- Preserving Academic Integrity <http://oaa.osu.edu/coam/ten-suggestions.html>

XI. Suggested Course Flowchart



**XII. Course Timeline: Tentative Schedule¹ for Class Meetings (Attendance Mandatory)
(additional team meetings with Professor will occur in an ongoing fashion as
scheduled between Professor and Team)**

REMINDER: Never schedule other activities for the class time slot (Monday 5:30 – 8:30), whether or not listed as a “Key Class Session” day.

Key Sessions Day/Date	Activity
Class Session # 1 Monday 1/09/17	<ul style="list-style-type: none"> • Course Overview • Course Expectations • Guidelines for Getting Started • Team Formation • Student Designate from Each Team <i>(Deliverable due by evening;; post to Dropbox the list of team members & designate)</i> • Project Briefing by Client Executives • Team work meetings with input from professor
Class Session # 2 Monday 1/23/17	
Mid-Semester Client Check-in Week 7 or 8	<ul style="list-style-type: none"> • Check-in with Client (each team will have a set time slot in which to meet with and get feedback from client)
Final Presentations Monday 4/24/17	<ul style="list-style-type: none"> • Final Presentations

¹ Note, this is a tentative schedule that may change depending on teams’ progress and needs. Students should always keep the class time slot (Tuesday 2:20 – 5:20 pm) open—do not schedule work or other non-class obligations in this time slot.

XIII. Sample components relevant for written Implementation Plan and Report²

- **Executive Summary**
- **Situation Analysis**
 - Current Context
 - Historical Context
 - Industry Analysis
 - Market Analysis
 - Competitor Analysis
- **Objectives**
 - Quantitative Benchmarks
 - Measurement Methods
 - Criteria for Success
 - Time Frame
- **Proposed Marketing Budget**
 - Amount; Allocations
 - Justification
- **Strategy**
 - Clear and concise articulation of customer value strategy including segmentation plan and value proposition by segment.
- **Execution**
 - Clear and concise articulation of tactics (what, when, where and how)
- **Evaluation**
 - Criteria
 - Methods
 - Consequences and Contingencies
- **Appendices**
 - Project Brief (template filled out for this project, see page 10)
 - Bibliography
 - Research Results (primary and secondary)
 - Sample Tactical Elements
 - Other Supporting Materials

² Note, some sub-sections may be abbreviated or not included depending on the nature of the project and input from the instructor. Always check with the instructor regarding whether, or how, to include each sub-section.

XIV. Project Brief Template

PART 1: Introduction

1. THE ASSIGNMENT

A brief preamble to the document sets up the context in which this brief is being written. Should include the objectives for the assignment, as well as metrics for evaluation.

2. BRAND'S VALUE PROPOSITION

3. WHAT IS THE BRAND PERSONALITY and VOICE? *How does the brand express itself?*

PART 2 (Competitive and Business Context)

6. WHERE DOES THE BRAND FIND ITSELF TODAY?

Provide a brief snapshot of the brand's health, performance and competitive situation and detail the key issues that surround the brand and pertain to the task at hand.

7. WHY ARE WE SPENDING MONEY on THIS BRAND?

What overall business problem/opportunity, or strategic goal, are we trying to address? (How does this link to particular objectives and tactics?)

8. WHAT DO OTHERS TYPICALLY DO?

- **STRATEGIC CATEGORY CONVENTIONS** *What are they?*
- **CREATIVE CATEGORY CONVENTIONS** *What are they?*
- **MEDIA CATEGORY CONVENTIONS** *What are they?*

9. KEY TAKEAWAYS

For each target:

WHAT IS THE ONE THING THAT MUST BE ACCOMPLISHED IN EACH TACTIC OF THE CAMPAIGN? IF ALL ELSE FAILS, THIS IS THE HEADLINE 'TAKE-AWAY.'

What is the single most important event or outcome that must be obtained in order to meet our objectives, deliver against the consumers' motivation, and strengthen the brand strategy?

PART 3 ('Nuts and Bolts')

10. MANDATORIES (*What are they?*)

11. TIMELINE (*What is it?*)

12. BUDGET (*What is it?*)

XV. Peer Evaluation Report *(POST to DROPBOX within 48 hours of the Final Presentation)*

Your Team (indicate by Name): _____

Your Name: _____

Please write in the name of each member in your group (including yourself). Then assign points (out of a maximum of 10) for each person, reflecting their true contribution to your project. This is an important feedback and learning mechanism, so be objective in your assessment. You can assign points between 0 and 10, for each member:

Name	Points (out of 10)
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
_____	_____

Comments about your group members:

XVI. Guidelines for Client / Team Interactions and Overall Professionalism

To help set expectations about interaction between clients and students, here are some guidelines:

- This is a competition as well as an action-based educational experience for the students. Information or insight from the client will be provided based on each team's requests (and availability on the part of the client). Each team is responsible for gathering what they deem is necessary or relevant. There is no requirement that what is provided to, or shared with, one team must be given to the other.
- Every attempt should be made to avoid cross-talk or sharing about what one or another team is doing. Unless otherwise specified by the course instructor, there should be an 'impermeable wall' among teams from the client's perspective and from each team's perspective.
- Clients are busy, working people. Each client should identify a primary contact person within their organization, who should be the 'go-to' person when teams have questions or need direction. Teams' interaction with the client should be limited if possible, and only on an as-needed basis.
- If requested, each member of each team MUST sign a non-disclosure agreement with their client before commencing with the first client meeting. (A sample non-disclosure agreement is attached on page 13 of this syllabus document.)
- The course instructor is available as a resource to clients as well as teams during this process. If clients or teams have questions or concerns, please contact the instructor immediately.
- Teams are acting as consultants, but clients should reserve judgment on team actions or performance until the end of the semester, when each team will make a presentation and turn in their Implementation Plan as well as supporting materials. Clients must arrange to be present for their teams' presentations; and students must attend ALL presentations, not just their own.

XVII. Sample Non-Disclosure Agreement

Please Note that this is only a sample. If an NDA is requested the actual form will be provided by the client that you are assigned to.

This is an Agreement between [ORGANIZATION] ("Organization name") and Second Party [STUDENT] ("Student name"). [ORGANIZATION] may be disclosing to Second Party confidential and proprietary information of a technical or commercial nature for certain technical, business, or other purposes, and would not make such disclosures without Second Party's agreement to maintain confidential treatment of such information in accordance with the terms hereof. Therefore, the parties agree as follows on and as of this [] day of January 2011:

1. Information. "Information" shall consist of any written, audible, visual, or oral information or physical items disclosed by a party of the nature described on page 2 of this Agreement during the disclosure period specified on that page ("Disclosure Period") that is either (i) marked with a restrictive legend, or (ii) in the case of Information disclosed orally, is identified as confidential or proprietary at or prior to disclosure. "Information" shall also include the fact that the parties provided information to each other and engaged in discussions.
2. No Disclosure. Second Party will not disclose to any third party any Information, without the prior written consent of [ORGANIZATION] and then only to the extent specified in such consent. Second Party shall limit access to the Information of the other to those employees, consultants, and independent contractors who have entered into appropriate confidentiality agreements and shall ensure compliance with the terms of such agreements. Second Party may also disclose Information to employees of its parent company or entity (if any) and to its legal and financial advisors who are under a professional obligation to maintain such Information in confidence, in each case on a need-to-know basis. Information may be copied and disseminated within the receiving party's own organization only to the extent reasonably required for the purposes hereof.
3. Exceptions. The restrictions on disclosure of Information described in Paragraph 2 do not extend to any item of information which (i) is or becomes publicly known without breach of this Agreement, (ii) is lawfully received by Second Party from a third party not bound in a confidential relationship to the disclosing party, (iii) is published or otherwise made known to the public by Second Party, or (iv) was generated independently by Second Party. Second Party may disclose Information to the extent required by law provided that Second Party must give [ORGANIZATION] prompt notice and shall comply with any valid protective order.
4. Additional Disclosure. Except as provided in this Paragraph 4, only the Information described above may be disclosed under this Agreement through the parties' designated representatives named below. Any time one of the parties wishes to

disclose additional Information, the party must first deliver a Supplement which will contain a non-confidential description of the additional Information to be disclosed as well as any additional terms and conditions for that Information. Any party may elect not to receive any additional Information described in a Supplement, but a party shall be deemed to have agreed to be bound by this Agreement and the Supplement by voluntarily participating in the disclosure. The only time both parties are required to sign a Supplement is when it contains additional terms and conditions. If there is a conflict between the provisions of the Agreement and a Supplement, those of the Supplement shall prevail, with all other provisions of the Agreement remaining in full force and effect.

5. Competitive Products. No License. The parties agree that nothing contained in this Agreement or any discussion between the parties, including without limitation any disclosure of Information hereunder, will impair the rights of either party to make, procure and market products or services, now or in the future, which may be competitive with those offered by the other party. Neither this Agreement nor any disclosure of Information grants the receiving party any license under any patents or copyrights, and as between the parties hereto, all information will remain the exclusive property of the disclosing party or its licensors.
6. Irreparable Harm. A violation of this Agreement by either party would cause irreparable harm to the other party for which no adequate remedy at law exists; and each party therefore agrees that, in addition to any other remedies available, the aggrieved party shall be entitled to injunctive relief to enforce the terms of this Agreement. The prevailing party shall be entitled to recover all costs and expenses, including reasonable attorney's fees incurred because of any legal action arising in relation to this Agreement.
7. Return of Information. Unless otherwise agreed, upon written request by [ORGANIZATION], Second Party will promptly return any written Information and all physical media on which Information was received, with a letter confirming that the Information has in no way been reproduced or copied or that all copies have been destroyed.
8. Term. The obligations of this Agreement shall apply to Information for a period of five (5) years following the last day of the applicable Disclosure Period.
9. General. This Agreement shall be binding on both parties and their respective successors and assigns and shall be governed by the laws of The State of Wisconsin, excluding its conflicts of law rules. Any competent court located in Illinois will have jurisdiction over any legal matter.

Neither party may assign its rights or delegate its duties or obligations under this Agreement without the other's prior written consent.

Either party may terminate this Agreement by providing written notice to the other provided that all existing rights and obligations pertaining to Information disclosed prior to termination shall survive and shall apply to either party's successors and assigns.

This Agreement supersedes all other prior agreements, oral or written, and all other communications between the parties relating to its subject matter.

This Section Must be Completed

Non-Confidential Description of Information to be Disclosed:

By [ORGANIZATION]: Various written and oral disclosures relating to strategic business and implementation plans.

By Second Party: N/A.

Disclosure Period: ____/____/____ to ____/____/____
(may not exceed one year)

[ORGANIZATION]

SECOND PARTY

By: _____

By: _____

Signed: _____

Signed: _____

Title: _____

Title: _____

XVIII. Instructor Bio

Dr. Deborah Mitchell Clinical Associate Professor

Deborah Mitchell has a unique background that combines academic and industry expertise.

She received her Ph.D. in Marketing and Behavioral Science from the University of Chicago and began her academic career as a faculty member at the Wharton School of the University of Pennsylvania. She has held faculty positions at Stanford University Graduate School of Business, the Wharton School and the Johnson Graduate School of Management (Cornell). Prior to joining Fisher in 2012 she was a faculty member at the Wisconsin School of Business (University of Wisconsin-Madison), where she was Executive Director of the Center for Brand and Product Management, taught various marketing courses and was awarded “School of Business Teacher of the Year” by full-time MBA students two years in a row.

Deborah’s research has been published in the *Journal of Consumer Research*, *Journal of Consumer Psychology* and *Journal of Advertising*. In addition to her academic career, Deborah has worked closely with industry leaders as president of CypressTree Corp. Clients have included Time-Warner, CNN, Bristol Meyers Squibb, General Motors, TIAA-CREF and Syngenta. Her consulting work has focused heavily on brand-based change initiatives, with an emphasis on building brand and product management excellence across a variety of organizations.

